



# 2007 UBO/UBU Conference

**From Registration to Accounts Receivable - The Whole Can of Worms**



Briefing: Smart Book  
(The MSA  
Perspective)

Date: 21 March 2007

Time: 1510 - 1600



- Determine the why, what, how, and who involved
- Know what a Smart Book is
- Understand the value & benefits of developing and using a Smart Book for the MSA
- Learn what is necessary to produce your own Smart Book version locally
- Identify and train your intended audience





# Why Was the Smart Book Developed?

Effective October 2002, the Department of Defense transitioned to an itemized billing methodology for outpatient services. Successful implementation of Outpatient Itemized Billing was expected to result in improved billing operations and increased revenue





# What Is a Smart Book?

A local manual that is developed as a reference guide to provide step-by-step instructions for completion of the daily administrative tasks required by all clinic clerks, receptionists, and other applicable personnel





# Why Bother? What's In It for the MSA?

- Training of clinic level employees on the proper procedures for processing patients directly affects the quality of the account information that the MSA receives
- The better informed clinic personnel are on ID procedures, NDEERS processing, PATCAT verification, etc., at the **front end**, will result in a significant decrease in the number of errors and issues that the MSA must contend with at the **back end** of the process





# What - Benefits of Having a Smart Book

- More accurate Accounts Receivable
- More accurate PATCATs
- Clinic personnel know the Point of Contact for issues
- Clinic personnel receive proper training in required daily procedures
- Clinic personnel become more confident and adept at identifying and reporting issues before they become major issues



# How - Developing a Smart Book

- Assemble a team of Subject Matter Experts
- Suggested members: UBO, MSA, DQ, Clinical Support, IM
- Observe clinic processes
- Determine areas that should be incorporated into the Smart Book to tailor it for your specific needs
- Assign areas of input to team members
- Assemble, test (obtain Command concurrence), and publish your Smart Book



## Who - Identify and Train

- Identify the trainers
- Assemble the training materials and test a training session
- Identify the level of employees for the training
- Identify and schedule the employees for the training
- Obtain feedback from the employees and adjust future training as necessary
- Follow up and observe again at the clinic(s) to determine the effectiveness of the training
- Put procedures in place to train new employees when they first start work







- Smart Book – The MSA Perspective. We have discussed:
  - The why, what, how, and who involved
  - What a Smart Book is
  - The value and benefits of developing & using a Smart Book for the MSA
  - What is necessary to produce your own Smart Book version locally
  - Identifying and training your intended audience

William Beaumont Army Medical Center Smart Book at UBO/UBU web site.  
[www.akj;lskfj;alkjdlf.mil](http://www.akj;lskfj;alkjdlf.mil)





# Questions?

